

Product: CGM DAQbilling

Version: 4.0.20

Release Date: December 2014

Customer Support: Contact the Help Desk at (800) 359-0911 option 5 with any questions.

Introduction

This document contains information regarding the current DAQbilling release.

New Contracted Services

DAQReminders: DAQReminders is a contracted service that contacts a patient prior to an appointment by phone, email, or text message.

Customers may use this feature to automate the necessary yet time consuming task of reminding patients about upcoming appointments. DAQReminders is more effective and efficient than traditional manual methods. This service can reduce no shows at your practice and free up your busy staff at the same time.

A Contact Preferences field now resides on the Patient Demographic screen. Up to two (2) contact preferences may be chosen. The contact preferences include any phone number or email address present in the patient's demographics. A "Do not use DAQReminders to contact" option is also available. This option disables DAQReminders for a specific patient.

Alert

The Contact Preferences option is also available from the Appointment screen.



Note: Changing the Contact Preferences on the Appointment screen will change the Contact Preferences in the Patient Demographics.

The patient has the ability to respond to the reminder. The response to the DAQReminder displays as the status. The status is visible from the Open Appointment, Scheduler, and DAQReminder Review Report screens.

James SMITH XXX

Type: FOLLOW UP Created: 11/11/2014 BIL Modified: 11/11/2014 BIL

Start: 11/11/2014 08:45 AM Duration: 30 Minutes All Day Event

Contact Preferences (Phone/e-mail): 1- OFFICE 2- CELL-TEXT Do not use DAQReminder to contact

Patient: 007 bond P james Home Phone: (923) 108-4875 Balance: \$12,685.00
 Status: Confirm Work Phone: Last Appt: 12/8/2107

Tuesday, November 11

9:00 bond P james [007] : FOLLOW UP - Appt Reminder : Confirm

November, 2014

Appointment Reminder : Confirm

FOLLOW UP
8:45am-9:15am
30 Minutes

The DAQReminder Review Report screen has been added to the Patient Management section. This screen displays patients that have received or will receive a DAQReminder, as well as their status.

DAQReminder Review Report

Appointment Date: 10/29/2013 11/11/2014

Patient No	Patient Name	Appt Date	Status	Date Received	Date Send	Dr. Name	Location	Appt. Reason	Insurance
007	bond P james	9/16/2014 8:45:00 AM			9/11/2014 4:46:01 PM	james SMITH	Mount Sinai Medi	FOLLOW UP	HCFA Print
007	bond P james	10/4/2014 8:15:00 AM		Oct 2 2014 10:16AM	10/3/2014 11:13:38 AM	james SMITH	Mount Sinai Medi	ALLERGY INJECTION HCFA Print	
007	bond P james	10/6/2014 8:00:00 AM		Oct 2 2014 10:16AM	10/3/2014 11:13:37 AM	james SMITH	Mount Sinai Medi	ECHOCARDIOGRAM, HCFA Print	
003	MARGE J.B. O'SIN	10/6/2014 8:45:00 AM		Oct 2 2014 10:16AM	10/3/2014 11:13:31 AM	james SMITH	Mount Sinai Medi	HOME VISIT	It Works But Rare
5037	BEGONA a	10/6/2014 10:00:00 AM		Oct 2 2014 10:16AM	10/3/2014 11:13:33 AM	james SMITH	Antek Family Pra	FOLLOW UP	
009	Bill Bond	10/7/2014 8:30:00 AM		Oct 2 2014 10:16AM	10/3/2014 11:13:35 AM	james SMITH	Antek Family Pra	ALLERGY INJECTION AARP	
007	bond P james	10/7/2014 9:15:00 AM	Email Sent, Cancel Req	Oct 2 2014 10:16AM	10/3/2014 12:30:42 PM	james SMITH	Mount Sinai Medi	ECHOCARDIOGRAM HCFA Print	
007	bond P james	10/10/2014	Answered By Machine	Oct 7 2014 4:08PM	10/8/2014 11:58:20 AM	james SMITH	Mount Sinai Medi	ECHOCARDIOGRAM HCFA Print	
003	MARGE J.B. O'SIN	10/10/2014 1:00:00 AM	Answered By Machine	Oct 7 2014 4:08PM	10/8/2014 1:10:43 PM	james SMITH	Mount Sinai Medi	FOLLOW UP	It Works But Rare

Edit Patient Refresh OK

DAQReminder icons and descriptions:

Icon	Description
	The phone call was answered by a person.
	The phone call was answered by an answering machine.
	The phone call was not answered.

Icon	Description
	The phone line was busy.
	The phone call was disconnected.
	The patient confirmed the appointment.
	The patient cancelled the appointment.
	The patient requested to reschedule the appointment.
	The patient confirmed the appointment by text message.
	The patient cancelled the appointment by text message.
	The patient responded with more information than just to confirm or cancel the appointment.
	A text message was sent to the patient.
	A text message was not sent to the patient.
	An email was sent to the patient.
	An email was not sent to the patient.
	The patient cancelled the appointment by email.
	The patient requested to reschedule the appointment by email.
	The patient confirmed the appointment by email.
	The patient's email address was invalid.

New Features and Enhancements for Existing Contracted Services

Insurance Eligibility Verification (IEV): In this release, improvements were made to automated IEV functionality, as well as several usability enhancements. It is now easier to review and navigate verification statuses.

The option to select medical specialties has been added to the IEV tab in the Practice Settings screen. Up to five (5) medical specialties can be selected. When IEV is requested, the messages sent from the insurance company will be reviewed for coverage of the specific specialties chosen.

Description	Value
Automated Medicare IEV requests	<input checked="" type="checkbox"/>
Automated Medicaid IEV requests	<input checked="" type="checkbox"/>
Automated BC/BS IEV requests	<input checked="" type="checkbox"/>
Automated Commercial IEV requests	<input checked="" type="checkbox"/>
Automated Tricare IEV requests	<input checked="" type="checkbox"/>
Medicare IEV requests fewer than this many days apart are considered too frequent	30
Medicaid IEV requests fewer than this many days apart are considered too frequent	30
BC/BS IEV requests fewer than this many days apart are considered too frequent	30
Commercial IEV requests fewer than this many days apart are considered too frequent	30
Tricare IEV requests fewer than this many days apart are considered too frequent	30
Automated Medicare IEV requests will be issued this many days before scheduled	1
Automated Medicaid IEV requests will be issued this many days before scheduled	1
Automated BC/BS IEV requests will be issued this many days before scheduled	1
Automated Commercial IEV requests will be issued this many days before scheduled	1
Automated Tricare IEV requests will be issued this many days before scheduled	1
IEV Specialty #1	Health Benefit Plan Coverage
IEV Specialty #2	Surgical
IEV Specialty #3	
IEV Specialty #4	
IEV Specialty #5	

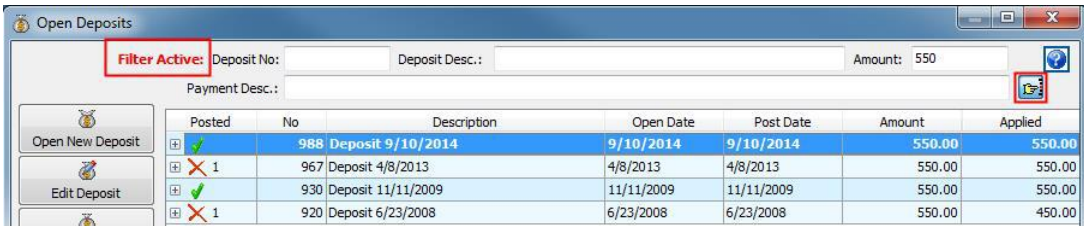
Based on the specialties chosen, the Status and Failure Reason columns display Verified along with the number of active benefits for the patient.

Patient No.	Name	Requested	Appointment	Insurance	Status	Failure Reason
527		10/31/2014	11/6/2014 10:15:00 AM	AETNA	Verified (Active & Other)	21 Active benefit(s) found for
531		10/31/2014	11/6/2014 9:15:00 AM	BLUE CROSS BLUE SH	Verified (Active & Other)	9 Active benefit(s) found for
531		10/31/2014	11/6/2014 9:45:00 AM	BLUE CROSS BLUE SH	Verified (Active & Other)	9 Active benefit(s) found for
527		10/31/2014	11/6/2014 9:45:00 AM	AETNA	Verified (Active & Other)	21 Active benefit(s) found for
708		11/4/2014	11/6/2014 9:15:00 AM	MEDICARE	Verified	
708		11/4/2014	11/6/2014 9:00:00 AM	MEDICARE	Verified	

Enhancements for Existing Features

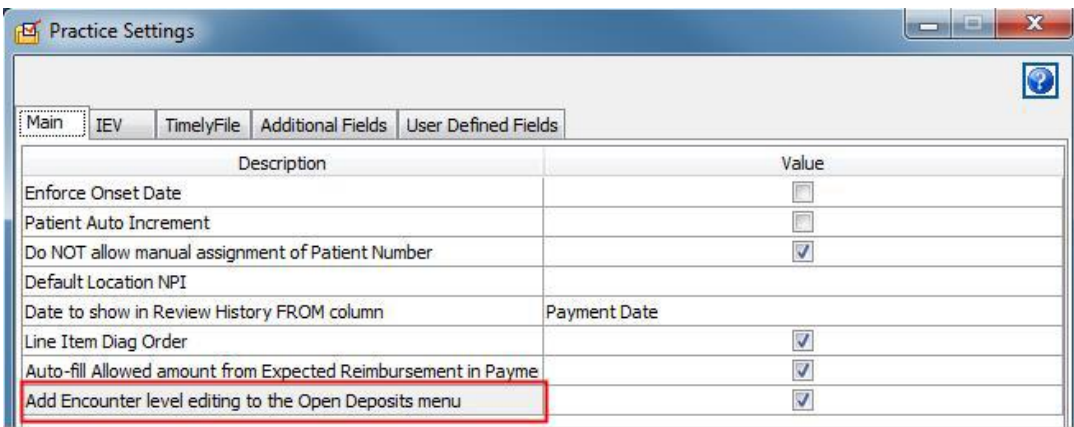
Open Deposits Screen:

Filter: A filter function has been added to the Open Deposit screen. This feature makes it easier to review and navigate payment information. Enter a value into the filtering fields and click the Filter icon to activate. The screen indicates Filter Active and the results are displayed on the screen. Click the Filter icon again to remove the filter.

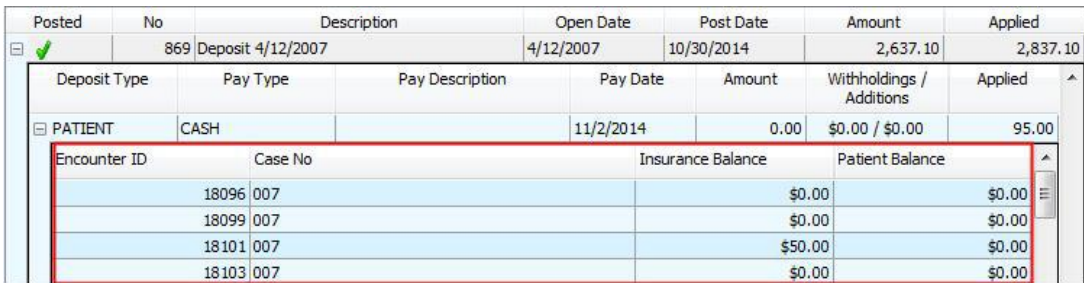


Encounter Level Editing: An Encounter Level editing function has been added to the Open Deposit screen. Encounter Level Editing allows a payment to be expanded to display all the encounters where the payment is applied. This option is activated from the Main tab in the Practice Settings screen.

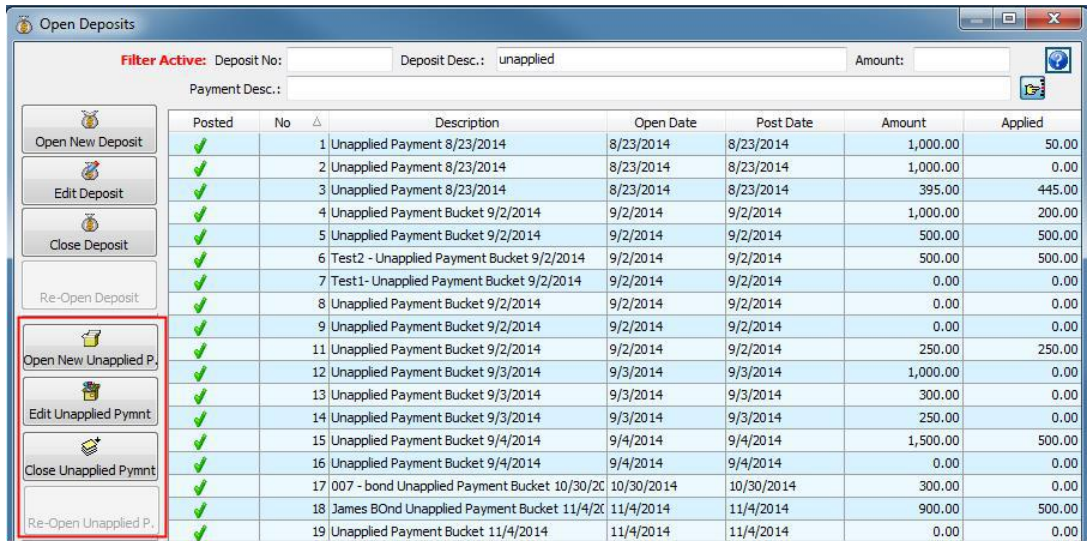
This feature is ideal when opening payments with many encounters. This feature speeds up navigation by allowing users to view encounter details within a payment on the Open Deposit screen on an as needed basis.



Once a payment is expanded, click the desired encounter to display the Patient Payment screen for more details.



Unapplied Payment Bucket: An Unapplied Payment Bucket function has been added to the Open Deposit screen. This feature allows the user to hold a surplus of funds from a patient. Once a patient has a balance, the funds from the Unapplied Payment Bucket can be applied to an encounter from the Patient Payment screen. This feature is useful for managing funds when patients pay in advance (pre-pay) for future visits.

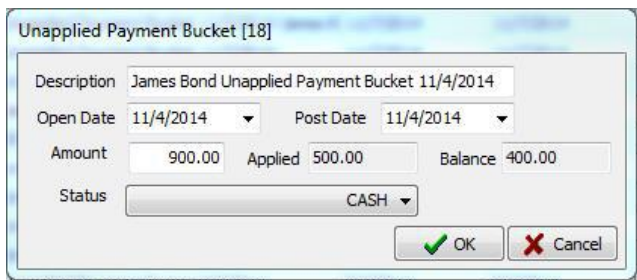


Posted	No	Description	Open Date	Post Date	Amount	Applied
✓	1	Unapplied Payment 8/23/2014	8/23/2014	8/23/2014	1,000.00	50.00
✓	2	Unapplied Payment 8/23/2014	8/23/2014	8/23/2014	1,000.00	0.00
✓	3	Unapplied Payment 8/23/2014	8/23/2014	8/23/2014	395.00	445.00
✓	4	Unapplied Payment Bucket 9/2/2014	9/2/2014	9/2/2014	1,000.00	200.00
✓	5	Unapplied Payment Bucket 9/2/2014	9/2/2014	9/2/2014	500.00	500.00
✓	6	Test2 - Unapplied Payment Bucket 9/2/2014	9/2/2014	9/2/2014	500.00	500.00
✓	7	Test1- Unapplied Payment Bucket 9/2/2014	9/2/2014	9/2/2014	0.00	0.00
✓	8	Unapplied Payment Bucket 9/2/2014	9/2/2014	9/2/2014	0.00	0.00
✓	9	Unapplied Payment Bucket 9/2/2014	9/2/2014	9/2/2014	0.00	0.00
✓	11	Unapplied Payment Bucket 9/2/2014	9/2/2014	9/2/2014	250.00	250.00
✓	12	Unapplied Payment Bucket 9/3/2014	9/3/2014	9/3/2014	1,000.00	0.00
✓	13	Unapplied Payment Bucket 9/3/2014	9/3/2014	9/3/2014	300.00	0.00
✓	14	Unapplied Payment Bucket 9/3/2014	9/3/2014	9/3/2014	250.00	0.00
✓	15	Unapplied Payment Bucket 9/4/2014	9/4/2014	9/4/2014	1,500.00	500.00
✓	16	Unapplied Payment Bucket 9/4/2014	9/4/2014	9/4/2014	0.00	0.00
✓	17	007 - bond Unapplied Payment Bucket 10/30/2014	10/30/2014	10/30/2014	300.00	0.00
✓	18	James Bond Unapplied Payment Bucket 11/4/2014	11/4/2014	11/4/2014	900.00	500.00
✓	19	Unapplied Payment Bucket 11/4/2014	11/4/2014	11/4/2014	0.00	0.00



Note: The Unapplied Payment Bucket can only be used for patient payments.

Click **Open New Unapplied Payment** to create an Unapplied Payment Bucket. The details of the payment can be entered into the Unapplied Payment Bucket. This feature keeps track of the amount that has been applied and the remaining balance.



Unapplied Payment Bucket [18]

Description: James Bond Unapplied Payment Bucket 11/4/2014

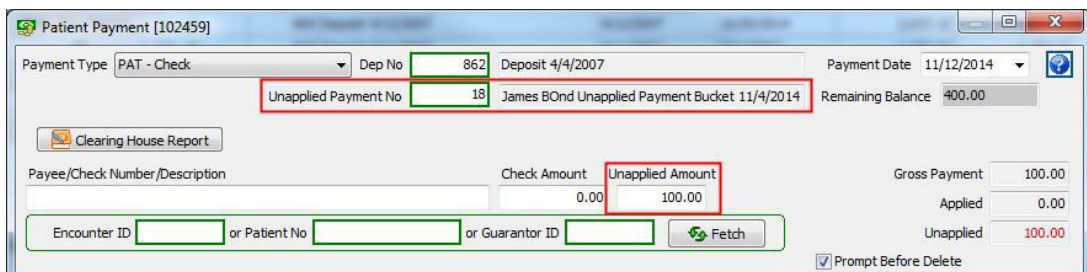
Open Date: 11/4/2014 Post Date: 11/4/2014

Amount: 900.00 Applied: 500.00 Balance: 400.00

Status: CASH

OK Cancel

From the Patient Payment screen, an unapplied payment can be selected from which to transfer funds. Once an Unapplied Payment Bucket is selected, the amount that is to be used from the unapplied payment can be entered into the Unapplied Amount. The payment can then be applied to a patient's encounters as needed.



Patient Payment [102459]

Payment Type: PAT - Check Dep No: 862 Deposit 4/4/2007 Payment Date: 11/12/2014

Unapplied Payment No: 18 James Bond Unapplied Payment Bucket 11/4/2014 Remaining Balance: 400.00

Clearing House Report

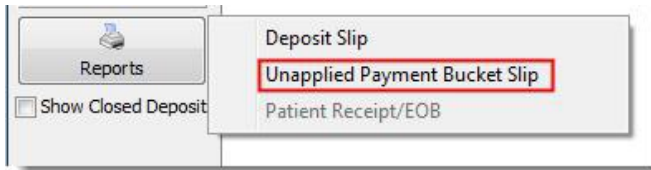
Payee/Check Number/Description Check Amount: 0.00 Unapplied Amount: 100.00 Gross Payment: 100.00

Encounter ID or Patient No or Guarantor ID Fetch

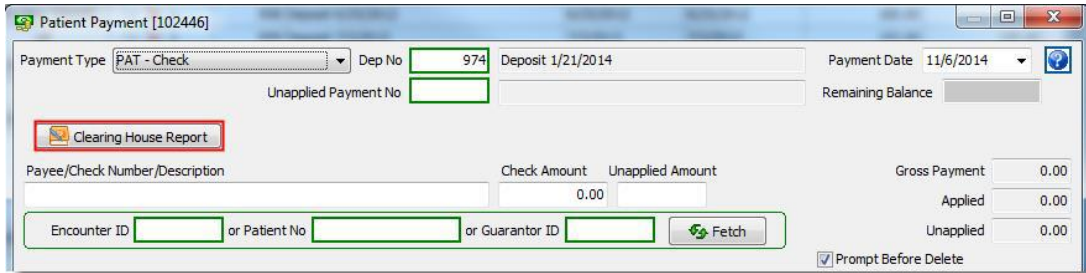
Applied: 0.00 Unapplied: 100.00

Prompt Before Delete

An Unapplied Payment Bucket Slip report has been added to the Open Deposit screen. When an Unapplied Payment Bucket Deposit is selected, this report is generated and displays all the encounters where the unapplied payment is applied.

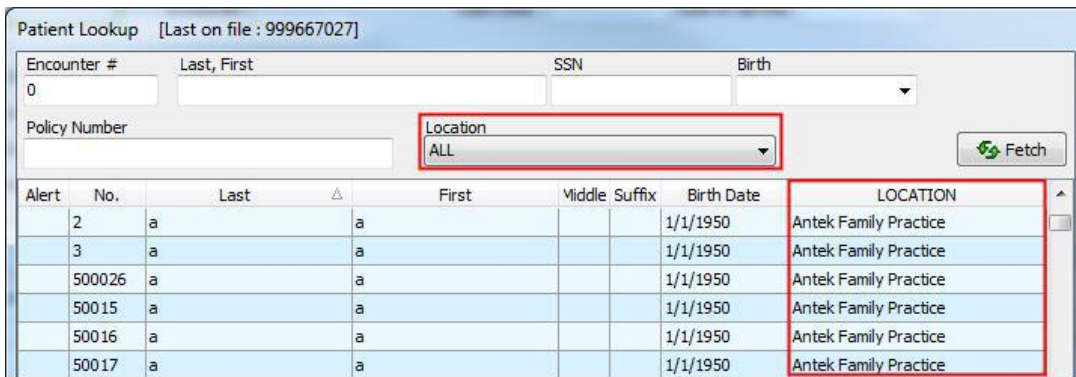


Clearinghouse Reports: The ability to access the Clearinghouse Reports has been added to the Patient Payment screen.



Patient Lookup (multiple screens):

Patient Lookup by Location: The option to search by default location has been added to the Patient Lookup screen. A new column has also been added that displays the default location of the patient.



Encounter Screen:

Diagnosis Code Pointers: The Diagnosis Code Pointers field has been changed to four columns allowing the diagnosis code pointers to be entered on the Encounter screen. This feature allows for faster editing of Dx code pointers by allowing users to navigate through the Tab button and edit the encounter.

Encounter [007] bond P. James Birth: 8/28/1980 Age: 34 years

No. 007 Encounter 19151 Claim Date 11/12/2014 Date of Service 11/12/2014

THIS IS A PATIENT ALERT

Provider 1 Ward F. Doom M.D. Location Mount Sinai Hospital (2)

Primary AARP (18) ICD Type ICD9

Secondary

Tertiary

☐ Review ☒ Bill Electronic ☐ Do Not Split Encounter ☒ Default Accept Assignment

Primary Onset Date

Expected Copay = \$18.10

Description	Proc	Addl	From	To	M1	M2	M3	M4	DX1	DX2	DX3	DX4	POS	TOS	Units	Pat Resp	Charge
1 ANESTH, SALIVARY GLA	00100		11/12/2014	11/12/2014					1				11	1	1	0.00	100.00
2																	

Insurance Setup Screen:

Routing ID Lookup: The ability to view the Payer ID has been added to the Routing ID Lookup and the Insurance Setup screen.

Routing ID Lookup

Fetch

Routing ID	Description	Payer ID
150002	NY MEDICAID	NYMCD
70010106	MESA MENTAL HEALTH	85035
2006	NHIC MEDICARE HCFA	75275
3000103	NHIC	75275
2022	AMERIHEALTH	56743
700211	Medical Claims Service	4258
705170	QUINCY HLTHCARE MGMT., INC.	37129

Insurance Company [1] Cigna Health Care

No. 1 Name Cigna Health Care ☐ Inactive

Routing ID 7000057 CIGNA (PROVIDENT)(CT GENERAL)(EQUICO Plan Type COMMERCIAL

Timely Filing Period Timely Filing Warn Days Payer ID 62308